



UNITED STATES DEPARTMENT OF COMMERCE  
National Oceanic and Atmospheric Administration  
OFFICE OF ACQUISITION AND GRANTS

April 25, 2007

MEMORANDUM FOR: Assistant Administrators  
Staff Office Directors  
Deputy Associate Administrators  
Chief Financial/Administrative Officers  
Heads of Contracting Offices

FROM: Helen Hurcombe /original signed by/  
Director

SUBJECT: Fiscal Year (FY) 2008 Agency Acquisition Planning  
Instructions

ACTION REQUESTED BY: July 15, 2007

Federal Acquisition Regulation (FAR) Part 7 provides the statutory requirement for acquisition planning. This memorandum provides the specific annual guidance necessary for developing the Agency Acquisition Plan (AAP) for FY 2008.

Two events in FY 2007 significantly impacted our ability to effectively plan for our acquisitions. Specifically, an extended Continuing Resolution and AGO's inability to provide meaningful system support of the Strategic Acquisition Management (SAM) system due to their dedication to implementing and resolving issues with C-Request. Accordingly, use of SAM was suspended and it is our intent to continue that suspension for FY 2008. This decision is made based on the current state of C-Request and the resources necessary to support that system.

However, it is essential that an agency acquisition plan be developed by consolidating the planned acquisitions of all NOAA Line and Staff Offices. In order to do that, we will utilize an Excel spreadsheet which has been formatted to meet our needs for clarity in the projection of planned acquisitions. A copy of the spreadsheet is attached (Attachment A). The spreadsheet columns should not be modified in any way as this will permit us to quickly consolidate and to provide the business opportunity forecast AGO is required to provide the Department of Commerce.

Attachment B, FY 2008 Acquisition Planning Instructions, are provided for guidance to the Line and Staff Offices and Program Directors. Consistent with the budget structure, each Associate Administrator/Staff Office Director is responsible for the development and approval of his/her advance Component Acquisition Plan (CAP), which includes the individual Acquisition Plans in support of both the individual Line/Staff Office and Programs that fall within their budgetary authority.

In order to maintain effective planning and execute timely awards, I urge you to limit fourth quarter spending to no more than 30 percent of the annual total when developing your FY 2008 Component Acquisition Plans. Line and Staff Offices are also encouraged to establish contracts on “other than a Fiscal Year basis” (e.g., don’t have contracts begin early in the fiscal year and end late in the fiscal year). This helps to eliminate the uncertainty of funding availability and to minimize the number of funding actions associated with multiple continuing resolutions early in the fiscal year.

If members of your staff have any questions, they may contact Gary Rice (301-713-0325) of my staff.

Attachment A – FY 2008 Acquisition Planning Spreadsheet

Attachment B – Agency Acquisition Planning Instructions for FY 2008

NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION

AGENCY ACQUISITION PLANNING  
INSTRUCTIONS FOR FISCAL YEAR 2008

Prepared by:  
Acquisition and Grants Office

Issued:  
April 25, 2008

National Oceanic and Atmospheric Administration  
Agency Acquisition Planning Instructions  
For Fiscal Year 2007

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## **Part I. Agency Acquisition Planning Requirements**

### **A. Advance Acquisition Planning**

Acquisition planning requires early communication and close coordination among: (1) each Program Manager; (2) Line and Staff Office management; (3) the cognizant acquisition division; and (4) internal and external review/approval authorities. This strategy will help assure that (1) NOAA's acquisitions are completed timely, effectively and efficiently; (2) Federal and Departmental Acquisition Regulations and Bureau acquisition policies are adhered to; and (3) meaningful data is provided to higher monitoring authorities.

### **B. Component Acquisition Plan (CAP)**

The Agency Acquisition Plan (AAP) is a consolidation of the CAPs of the various Line and Staff offices. Given the current budgetary structure for NOAA, funding for all acquisitions flows from Line and Staff Offices. This means that Line and Staff Offices need to ensure that their plan includes not just the acquisitions that support their individual Line/Staff Office, but also those acquisitions that support the various NOAA programs and which may or may not be funded in part by another Line or Staff Office.

A component's (Line or Staff Office) consolidated list of their Advance Procurement Plans (APP) is called a CAP. A consolidated list of CAPs is called the AAP.

Components must individually identify each of their planned acquisitions or APPs as follows:

1. Where the estimated life cost is over \$100,000 or when a modification to an existing contract that changes the terms/conditions of that contract and the value of the modification itself exceeds \$100,000.
2. Anytime the acquisition is expected to result in a new contract award, regardless of dollar value.
3. A modification to exercise an option or a task/delivery order under an existing NOAA contract, regardless of dollar value. Each individual task/delivery order must be identified as a separate acquisition action. It is not sufficient to "lump" all anticipated task/delivery orders into one APP.
4. Interagency or Other Special Agreements (IOSAs) under the Economy Act, as defined in the DOC Interagency and Other Special Agreements Interim Handbook dated May 2004, if they exceed \$5,000,000. **Begin the plan name of each IOSA with IOSA as the beginning of the plan name.**

### **C. Items Excluded from the CAP/AAP:**

The following items are specifically excluded from the CAP/AAP:

1. Federal Standard Requisitioning and Issue Procedures (FEDSTRIP) – Requests for supplies and equipment that are acquired from the uniform requisitioning and issue system.

2. Printing – Requirements that are acquired in house via the Standard Form 1, Printing and Binding Requisition, to the Government Printing Office.
3. Travel – NOAA employee requirements that are authorized via Travel Order.
4. Telephone Utility Services – Actual telephone bills.
5. Training – Requirements acquired using the Request, Authorization and Certification of Training form.
6. Expenditures resulting in Obligation and/or Payment of Funds to Another Federal Government Agency – for example, Reimbursable Work Authorizations.
7. Grants – Any expenditure appropriately processed as a Grant or Cooperative Agreement under the Grants and Cooperative Agreement Act.
8. Administrative modifications to existing contracts which do not change the dollar value of the contract.

**D. Planning for Information Security in Acquisitions** – DOC Procurement Memorandum 2006-06 requires that an Information Security Checklist be completed for all acquisitions involving services. Discussions must be held between the assigned COR/COTR and the acquisition specialist and appropriate L/SO CIO to complete the mandatory Information Security Checklist. This Checklist, signed by the COR, the Program/Requesting Office IT Security Officer, and any other team members participating in the acquisition must be submitted with the requisition. CORs need to be familiar with the personnel clearance requirements and how those requirements will impact the contract schedule. As well, CORs must make decisions on the need for certification and accreditation (C&A) requirements for contractor systems or systems that will connect to an internal DOC/NOAA system and be aware of the requirements for approving such C&A submissions.

Planners need to ensure that appropriate planning and security requirements are taken into consideration whenever planning to acquire IT equipment, software and/or services or whenever Contractor personnel will have access to NOAA systems or facilities. Close coordination with the component Chief Information Officer (CIO) and/or the NOAA CIO's office or the DOC Office of Security is required well in advance of need.

**E. Budget and Spending Limitations**

Individual CAPs must be consistent with the estimates in NOAA's FY 2008 budget and should reflect the Component's/Program's spend plan.

Efforts should be made to limit the use of funds in the fourth quarter to no more than 30 percent. As well, planning must take into account that NOAA has a variety of funding streams—one year, two year, no-year, etc. funding. As well, it is recommended that every effort be made to get contracts off a “fiscal year schedule.” Given that we rarely have an appropriation at the start of the fiscal year, it is

recommended that contract schedules be developed to start and end at other than the start/end of the fiscal year. This ensures that required acquisitions can proceed and that multiple funding actions associated with funds available under a number of continuing resolutions are not required to be processed.

#### **F. Submission of CAPs**

CAPs shall be submitted electronically to Gary Rice at [Gary.Rice@noaa.gov](mailto:Gary.Rice@noaa.gov). All components are required to develop their CAP, which will consist of all known acquisitions planned in FY 2008 from their individual component and from all programs for which they have budgetary responsibility. CAPs shall be submitted no later than July 15, 2007. Line and Staff Offices and Program Managers should carefully review the planned FY 2008 budget and identify all dollars that are planned to be executed through the award of an acquisition. In addition to new acquisitions, this should include, as well, all on-going acquisitions where there are incremental funding requirements, options or renewals that will need to be executed in FY 2008. Requirements not known and submitted by July 15, 2007, should be submitted as an addendum to the previously submitted CAP to Gary Rice when they are identified and funding is known to be available.

#### **G. Deletion of APPs**

Whenever it becomes known that a planned acquisition is to be cancelled, for whatever reason, such cancellation should be executed through an e-mail notification to Gary Rice by the COR.

### **Part II. Development of the CAP**

#### **A. Development of the CAP**

1. Designated Component Planning Coordinators (CPC) should disseminate these planning instructions to all L/SO staff who will possibly require acquisitions to be processed for them.
2. The CPC should require that the spreadsheet be completed by each individual/office expecting to have acquisitions processed in FY 2008 and submitted to them for their review and consolidation by Line or Staff Office.
3. The CAP shall be reviewed and approved at a level no lower than the Line Office CFO or Staff Office Director and submitted to AGO on or before July 15, 2007.
4. Instructions for Completing the FY 2008 Planning Spreadsheet
  - a. **DO NOT CHANGE THE SPREADSHEET (e.g., DO NOT CHANGE COLUMN TITLES OR INFORMATION TO BE INCLUDED IN THOSE COLUMNS; DO NOT ADD OR DELETE COLUMNS)**
  - b. Column A – Leave Blank – AGO will assign
  - c. Column B – Insert name of Line or Staff office.

- d. Column C – Insert name of the office that will be submitting the acquisition within the named Line or Staff office.
- e. Column D – Enter the name of the individual who will be designated as the Contracting Officer Representative (COR).
- f. Column E – Enter the phone number of the COR.
- g. Column F – Enter a clear description of what the acquisition is for—the more descriptive the better. If it is a modification, delivery order, task order, or option, include the contract number against which the acquisition is to be processed. If it is a renewal of an existing contract, include the current contract number. It is **NOT** sufficient to enter, “renewal of contract xyz” or “maintenance services”. We need a clear description of what is being acquired.
- h. Column G – Enter the priority of this requirement. This column should identify those top priority acquisitions that will be virtually certain for funding and are essential for mission accomplishment (e.g., acquisitions that support basic operations). Lower priority rankings should be assigned to those acquisitions that are not critical for operations or for which there is significant funding uncertainty. This priority ranking is to be made at the L/SO level, not at the individual FMC/Lab/Office level. It is incumbent upon the L/SO Management and Budget Office to work with their sub-organizations to establish appropriate L/SO priorities. It is recognized that these priorities may change throughout the year as needs change or as new requirements are identified. The re-prioritization of APPs should be provided via e-mail from the L/SO CFO as they occur.
- i. Column H – Indicate, using the code provided in the column heading, the type of acquisition action that is anticipated.
- j. Column I – Insert the total value of the planned acquisition. Total value is calculated as follows:
  - 1. Base period and all options of multi-year acquisitions
  - 2. Maximum value of base period and any options for Indefinite Delivery/Indefinite Quantity contracts
  - 3. Value of total estimated quantity for base period and any options for Requirements-type contracts
  - 4. Total value for complete performance for any incrementally funded contracts
  - 5. Total value for all acquisitions (e.g., a fixed price contract that may take several years to complete but that are fully-funded at inception)



- k. Column J – Insert the dollars anticipated to be obligated in FY 2008.
- l. Column K – Insert the date by which the award is required.
- m. Column L – Based on the procurement action lead times, insert the date by which the requisition will be submitted to AGO for processing.
- n. Column M – Identify the type of money.
- o. Column N – Identify the NOAA Goal the acquisition will support.
- p. Column O – Identify the Object Class for the acquisition.
- q. Column P – Leave Blank; will be completed by AGO.
- r. Column Q – Leave Blank; will be completed by AGO.
- s. Column R – Include any additional information necessary.

**B. Changes to the CAP**

The CAP shall be updated as new acquisitions are identified throughout the fiscal year.

**C. Exceptional Situations Precluding Advance Planning**

As we learned with the hurricane season in FY 2005, flexibility must be built into the process to accommodate the processing of acquisitions for true emergency situations. This DOES NOT include acquisitions not included in the acquisition plan based on known budget information at the time of CAP due date. It applies to true emergency acquisitions such as those experienced in the aftermath of Hurricanes Katrina and Rita. In such events, the requirement for a written acquisition plan is waived. However, an oral plan will be agreed to and will be memorialized in the acquisition file by the Contract Specialist processing the acquisition. This memorialization will include a summary of the oral plan, the name of the approver, and the nature of the urgency that justifies the use of an oral plan. The summary must be included in any justification for using other than full and open competition required by FAR 6.302-2(c) (justification for other than full and open competition based on unusual and compelling urgency), or for using an exception to the fair opportunity process required by FAR 16.505(b)(4) (justification for soliciting award from only one awardee under a multiple award Indefinite Delivery, Indefinite Quantity type contract). The summary may be prepared after award if preparation before award would unreasonably delay the acquisition. A copy of every such oral plan memorialization shall be provided to the Bureau Procurement Official (the Director, Acquisition and Grants Office). These plans do not have to be included in an update to the CAP, but are required to be identified by a plan number configured as follows:

Acquisition Office Code, FY, sequential number by Acquisition Office (e.g., AB-07-0001).

### **Part III. Processing PRs**

#### **A. Relationship Between PRs and APP Line Items**

After assignment of the FY 2008 Advance Procurement Plan (APP) Number by the AGO, L/SOs will be provided with an updated copy of their CAP. This APP Number must be referenced on the requisition submitted to the acquisition office. There should be only one requisition associated with each APP line item number with the following exceptions:

1. An amendment to a requisition decreasing the dollar amount of a requisition previously received in the cognizant acquisition division that is **not Closed.** (See B below).
2. An amendment to a requisition increasing the dollar amount of a previously received requisition in the cognizant acquisition division that is **not Closed.** (See B below).

#### **B. Amended Requisitions**

Requisitions can only be amended if the original Requisition has not been awarded and closed out. If the original requisition has been awarded and closed out, a new requisition number must be assigned.

Note: Amended requisitions for additional funds should be numbered as an amendment to the original. If additional funds are needed in order to proceed with an award, those funds must be requested and received before the award can be made.

#### **C. Deficient Requisitions**

Any Requisition submitted without an APP line item number or does not fully adhere to these instructions will be deemed deficient. The Requisition will not be processed in the acquisition division until the deficiency is corrected. Only the cognizant HCO can grant an exception to this policy. A Requisition that fails to include appropriate supporting documentation and/or clearances/approvals will also be considered deficient. The development of the acquisition strategy (one or more conversations between the initiator and the assigned contract specialist) should lead to a complete understanding of what needs to be submitted with the requisition and, wherever possible, draft versions of the supporting documentation should be provided in advance to the assigned Contract Specialist for review/concurrence. This will mitigate the need to send documents back to the initiator for revisions.

Deficient requisitions will be handled as follows:

1. A requisition that shows a total dollar amount over \$100,000 will be treated as an individual APP line item requisition. The cognizant HCO will contact the responsible individual in the Line/Staff Office to have an individual APP line item created.
2. In all cases, a maximum of 14 calendar days will be allowed for the correction of all identified deficiencies. If the identified deficiencies have not been corrected by the close of business on the 14<sup>th</sup> day, the requisition will be

returned to the initiator for re-negotiation of a milestone plan for the APP and re-submittal of the corrected package to the cognizant acquisition office.

#### **Part IV. Procedure for Negotiating/Preparing Milestone Plans (MP) and Establishing the Governing MP Dates**

##### **A. Negotiating and Preparing an MP**

The Milestone Plan is based on the Procurement Action Lead Times for the various types of acquisitions included in the NOAA Acquisition Handbook. The standard lead times will be utilized unless mutually agreed to by the Initiator, the assigned Contract Specialist and the appropriate AGO approving official. The milestones identified for each type of acquisition reflect the procedural steps that must be taken in order to execute the acquisition and reflect the normal processing time for completing each step in the process. An MP must be generated for all new contract actions and is required at the discretion of the cognizant HCO for any acquisition other than a new contract. Once an acquisition has begun, it is the responsibility of the assigned Contract Specialist to maintain the currency of the milestone plan.

The assigned Contract Specialist will initiate discussions with the assigned COR early in the planning process to gain a better understanding of the requirement, to develop an appropriate acquisition strategy and to share with the COR the steps in the process and what the COR's responsibilities will be at each step of the process. The NOAA Acquisition Handbook provides similar guidance. The COR needs to be current in all required training and must understand the planned acquisition and his/her roles/responsibilities once the contract has been awarded. As well, it may be necessary to include (if not already included) appropriate performance standards in the designated CORs annual performance plan to include performance standards for their COR responsibilities and duties depending on the level of commitment necessary to execute COR responsibilities.

##### **B. Completing an MP and Establishing Planned MP Dates for an APP Line Item**

MPs establish planned dates for submittal of the acquisition request to the acquisition office and a planned award date, as well as, key milestones in the acquisition process appropriate for the individual acquisition. Any revision to the established submittal date of the acquisition request to the cognizant acquisition office and the planned award date established in the MP requires that the MP be renegotiated by the Contract Specialist and Project Officer and approved by the AGO approving official.

Negotiated MP dates must be adhered to regardless of the cutoff dates shown in Exhibit 1, Purchase Request Receipt Cutoff Dates. The MP establishes the specific cutoff date for submission of the planned acquisition request to the cognizant acquisition office and supersedes the generic dates established in the PR Receipt Cutoff Dates and reflects the specific steps that must be accomplished in the execution of the specific acquisition.

## **Part V. Processing Acquisition Requests**

### **A. Grace Period for Late Requisitions Associated with MPs**

A Requisition identified with an APP line item number that is received in the cognizant acquisition division up to 5-calendar days past the planned requisition submittal date on the MP will be accepted in the cognizant acquisition office as timely. A late requisition is defined as a requisition that is received more than 5 calendar days past the planned requisition submittal date specified in the MP.

### **B. Acquisition Division Processing of a Late Requisition**

Late requisitions are routed directly to the responsible Acquisition Division. On a case-by-case basis, the cognizant HCO has the right to retain or return a late requisition. If the requisition is retained, the Division may elect to renegotiate the MP and generate a new one to reflect the new planned award date. If it is determined that the requisition should be returned to the initiating component or otherwise re-routed, the requisition is returned and an e-mail notification is prepared to the initiating component. If the HCO decides the APP line item should be deleted, he/she informs the designated Component Planning Coordinator.

### **C. Deletion of an APP Line Item Number**

If an APP line item number is no longer needed, it should be deleted.

### **D. Acquisition Division Processing of a New APP Line Item (Unplanned)**

Requisitions that arrive in any NOAA acquisition division without an APP line item cannot be routed to a Contract Specialist until the APP line item is entered into the CAP by the initiator and approved by the appropriate approval chain within the component. The requisition will then be associated with the APP line item and routed to the appropriate Specialist for processing.

## **Part VI. Duties and Responsibilities of the CPC**

It is recommended that each Line and Staff Office designate an appropriate individual to serve as the Component Planning Coordinator (CPC). The duties and responsibilities of the CPC as they relate to Acquisition Planning are:

- A. Focal point for acquisition planning in their component.**
- B. Receive and disseminate planning information from AGO to all appropriate individuals within their component.**
- C. Educating individuals within their component who are substantially involved in the NOAA acquisition planning process.**
- D. Assisting their component's management and Program Managers with obtaining information on acquisition planning and acquisition status.**

## Exhibit 1

### Fiscal Year 2007 and 2008 Procurement Cutoff Dates

In accordance with the Year End Closing Instructions issued by the Finance Office, all Fiscal Year (FY) 2007 obligations must be recorded by **9/21/2007**.

The following cutoff dates have been established by the Acquisition and Grants Office for receipt of FY 2007 and 2008 procurement requests. The FY 2007 dates should also be used as a guide for the submission of FY 2008 procurement requests for new or continued services with a start date of October 1, 2007. Please use these dates as guidelines in planning your procurement requests.

<b>Dollar Value of Procurement Action</b>	<b>FY 2007 Cutoff Date*</b>	<b>FY 2008 Cutoff Date*</b>
\$0.00 - \$24,999.99	August 31, 2007	August 29, 2008
\$25,000.00 - \$100,000.00	July 17, 2007	July 17, 2007
Any order for <b>services</b> against an existing contract (GSA Schedule, GWAC, IDIQ)	June 29, 2007	June 27, 2007
Any <b>other order</b> against an existing contract (GSA Schedule, GWAC, IDIQ)	August 1, 2007	August 1, 2007
\$100,001.00 - \$499,999.00	May 1, 2007	May 1, 2007
\$500,000.00 - \$4,999,999.99	February 28, 2007	February 28, 2007
\$5,000,000.00 - \$9,999,999.99	January 30, 2007	January 30, 2007
\$10,000,000.00 and up	October 1, 2006	October 1, 2007

\*Assumes receipt of a complete procurement request package (ready requisition) with all necessary approvals and documentation.

These cutoff dates are provided as general guidance to be utilized when developing component acquisition plans. Each planned acquisition will have a milestone plan negotiated between the assigned Contract Specialist and the Project Officer which will establish submittal and completion dates for each acquisition.

While some of the dates for FY 2007 have already passed, the above dates are not inconsistent with cutoff dates established in prior fiscal years and they were provided to all Line and Staff Offices by memorandum from the Director, Acquisition and Grants Office, on February 28, 2006. These cutoff dates have been established based on many years of application of the statutory and regulatory requirements governing the processing of acquisitions in the federal Government and are calculated to permit full compliance with those statutes and regulations and to accommodate the increased acquisition workload that occurs at the end of each fiscal year. If there are acquisitions valued at \$100,000 or more to be submitted for award in FY 2007, the requesting program office should immediately contact their servicing Acquisition Management Division to discuss acquisition strategy and to determine the feasibility of processing the acquisition this fiscal year recognizing the statutory, regulatory and policy requirements associated with acquisitions of this dollar value and higher.

In keeping with long-standing policy, all requisitions will be accepted for processing, no matter when they are received and handled on a "best efforts" basis. However, for FY 2007 procurement requests received after the established cutoff dates will require compliance with the direction provided in the March 16, 2007, memorandum (copy attached) to Staff Office Directors, AAs, DAAs, CFOs and HCOs.

To assist program offices in planning for current and future acquisitions, the Type of Acquisition Action (TAA) List, Exhibit 2, found under Part 7 of the NOAA Acquisition Handbook provides standard procurement action lead times. These are generically established lead times for processing acquisitions of different types and dollar values. We are working to refine these lead times as part of our advance acquisition planning process and after tracking actual processing times this fiscal year.

[Attachment 1 - Late Submittal Template](#)



UNITED STATES DEPARTMENT OF COMMERCE  
National Oceanic and Atmospheric Administration  
OFFICE OF ACQUISITION AND GRANTS

March 16, 2007

MEMORANDUM FOR: Staff Office Directors  
Assistant Administrators  
Deputy Assistant Administrators  
Chief Financial Officers  
Heads of Contracting Offices

FROM: Helen Hurcombe /original signed by/  
Director

Subject: FY 2007 Cut-Off Dates for Submission of Acquisitions to  
AGO

By memorandum dated October 20, 2006, I issued instructions regarding the process for gaining approval for LO/SOs for the Acquisition and Grants Office to accept acquisitions beyond the established cut-off date. That process included obtaining my concurrence and the approval of the Deputy Under Secretary (DUS). The Continuing Resolution this fiscal year has made it difficult, but not impossible, to comply with the published submission cut-off dates. Most program offices have approached spending conservatively and have not submitted planned acquisitions pending receipt of final appropriations for the fiscal year. I am now being asked to modify the approval process for submission of delinquent planned acquisitions. Recognizing the need for NOAA to obligate funding in the maximum amount possible to avoid significant carry-overs, the approval process is being modified for this fiscal year only. This process has been discussed and concurred in by the DUS.

Program offices with acquisitions, which will not be or have not been submitted prior to the established cut-off dates, must take the following steps:

1. The Program Office requestor shall contact their servicing HCO to discuss the proposed requirement. Jointly, the HCO and the requestor will develop an acquisition strategy and milestone plan for accomplishing that strategy. Both the HCO and the requestor need to discuss during this strategy session what documentation must be received with the requisition in order for AGO to proceed with processing the requirement. Both HCO and requestor will sign the milestone plan (format attached). The requestor will provide a prioritization of their requirement, reflecting the concurrence of their LO/SO Chief Financial Officer, keeping in mind that not every acquisition can be the requestor's number 1 priority and that each LO/SO may need to prioritize requirements across their entire organization.
2. The milestone plan, acquisition strategy and prioritization will be forwarded, electronically, to the Director and Deputy Director, AGO, for review and approval.

3. Our decision will be provided following discussions with the cognizant HCO regarding other workload within their organization and the possibility, and associated risks, of being able to complete the delinquent requirement.
4. A decision will be issued by the Director or Deputy Director, AGO, as expeditiously as possible. Quick turnaround is based upon the adequacy, realism and soundness of the proposed acquisition strategy and milestone plan.
5. Any disagreement with the AGO decision may be appealed to the DUS.

The decision on whether to accept or reject a requested late acquisition will be based on compliance with acquisition regulations and policy and resources available to execute the acquisition. As well, failure to provide a complete requisition package by the agreed to submission date will result in the requisition being returned to the requestor without action. Resubmission of any returned requisition will require the concurrence of the AGO Director and approval of the DUS under the previously established approval process.

cc: Deputy Under Secretary

## MILESTONE PLAN

Description\_\_\_\_\_

Priority\_\_\_\_\_

CFO Concurrence\_\_\_\_\_

(CFO Signature or e-mail  
concurrence attached)

Acquisition Strategy: (address solicitation method, set aside determination, type of contract, funds availability, suggested vendors, market research conducted, clearances required)

## Milestone Plan

Date

- |                                                              |       |
|--------------------------------------------------------------|-------|
| 1. Requisition received by the Contracting Officer           | _____ |
| 2. Requisition review by CO for completeness/adequacy        | _____ |
| 3. Set Aside Determination                                   | _____ |
| 4. Special Approvals obtained                                | _____ |
| 5. Submission of Acquisition Plan (if required)              | _____ |
| 6. Legal review of Acquisition Plan (if required)            | _____ |
| 7. BPO review of Acquisition Plan (if required)              | _____ |
| 8. Acquisition Review Board (if required)                    | _____ |
| 9. Approval of Acquisition Plan                              | _____ |
| 10. FedBizOps Announcement posted                            | _____ |
| 11. Solicitation review(s) and clearances (OGC, CRB, BPO)    | _____ |
| 12. Issuance of solicitation                                 | _____ |
| 13. Pre-proposal/pre-bid conference (if required)            | _____ |
| 14. Solicitation closes                                      | _____ |
| 15. Technical Evaluation completed                           | _____ |
| 16. Business Evaluation completed                            | _____ |
| 17. Competitive Range/Pre-Negotiation Objectives established | _____ |
| 18. Complete negotiations/revised final proposals received   | _____ |
| 19. Evaluation of final proposals completed                  | _____ |
| 20. Source Selection/Price Negotiation Memorandum completed  | _____ |
| 21. Contract review(s) and clearance(s) (OGC, CRB, BPO)      | _____ |
| 22. EEO Compliance Review received (if required)             | _____ |
| 23. Award and Public Announcement                            | _____ |

Requestor Signature

Date

HCO Signature

Date

BPO Decision: ( ) Approved ( ) Denied ( ) Let's talk



**Exhibit 2**  
**Procurement Action Lead Times**

Type of Acquisition Action

<b>Code</b>	<b>Description</b>	<b>PALT*</b>
201	Delivery Orders & Simplified Acquisition up to \$25,000	15
202	Simplified Acquisition over \$25,000 to \$100,000	75
203	Delivery or Task Orders Over \$25,000	30
204	Complex Delivery or Task Orders	60
205	Simplified Acquisition \$2,501-\$100,000 Wage Determination Required	100
206	Test Program for Commercial Items \$100,000 to \$5,000,000	120
210	Sealed Bid \$100,000 to \$500,000	94
211	Sealed Bid, \$500,000 to Indefinite	106
212	Sealed Bid, \$100,000 to \$500,000, Wage Determination – Location Known	138
213	Sealed Bid, \$500,000 to Indefinite, Wage Determination – Location Known	150
214	Sealed Bid, \$100,000 to \$500,000, Wage Determination – Location Unknown	146
215	Sealed Bid, \$500,000 to Indefinite, Wage Determination – Location Unknown	158
220	Negotiated Competitive, \$100,000 to \$10,000,000	180
221	Negotiated Competitive, \$10,000,000 to indefinite	201
222	Negotiated Noncompetitive, \$100,000 to indefinite	174
223	Negotiated Competitive, \$100,000 - \$10,000,000, Wage Deter.-Location Known	224
224	Negotiated Competitive, \$10,000,000 to indefinite, Wage Deter. – Location Known	239
225	Negotiated Competitive, \$100,000 - \$10,000,000, Wage Deter. – Location Unknown	222
226	Negotiated Competitive, \$10,000,000 – Indefinite, Wage Deter. – Location Unknown	243
227	Negotiated Noncompetitive - \$100,000 – Indefinite, Wage Deter. – Location Unknown	222
230	Modification to Order	21
231	Misc. Modification – Administrative Change	20
232	Misc. Modification – Funding \$0 – Indefinite	30
233	Misc. Modification – Option \$0 – Indefinite	40
234	Misc. Modification – Unilateral Change Order - \$0 – Indefinite	30
235	Misc. Modification – Option \$0 – Indefinite, Wage Determination	75
240	Supplemental Agreement up to \$25,000, outside scope	67
241	Supplemental Agreement \$25,000 - \$500,000, outside scope	142
242	Supplemental Agreement, \$500,000 to Indefinite, outside scope	163
243	Supplemental Agreement up to \$25,000, outside scope, wage determination	118
244	Supplemental Agreement \$25,000 to \$500,000, outside scope, wage determination	150
250	8(a) Acquisition, \$0 - \$3,000,000 (\$0 - \$5,000,000 if manufacturing)	146
251	8(a) Acquisition \$3,000,000 – indefinite (\$0 - \$5,000,000 – Indefinite if	

	manufacturing	186
252	8(a) Supplemental Agreement \$0 – Indefinite	112
253	8(a) \$0 - \$3,000,000 (\$0 - \$5,000,000 if manufacturing) Wage Determination – Location Known	157
254	8(a) \$3,000,000 – indefinite (\$5,000,000 - indefinite if manufacturing) Wage Determination – Location Unknown	226
255	8(a) \$0 - \$3,000,000 (\$0 - \$5,000,000 if manufacturing) Wage Determination – Location Unknown	182
256	8(a) \$3,000,000 – Indefinite (\$5,000,000 – Indefinite if manufacturing) Wage Determination – Location Unknown	228
257	8(a) Supplemental Agreement \$2,501 – Indefinite, Wage Determination	154
260	A-76 Negotiated Competitive, \$100,000 - \$10,000,000, Wage Determination – Location Known	322
261	A-76 Negotiated Competitive \$10,000,000 – Indefinite; Wage Determination, Location Unknown	
262	A-76 Negotiated Competitive \$100,000 - \$10,000,000, Wage Determination, Location Unknown	
263	A-76 Negotiated Competitive \$10,000,000 – Indefinite, Wage Determination, Location Unknown	
264	A-76 Sealed Bid \$100,000 - \$500,000, Wage Determination, Location Known	
265	A-76 Sealed Bid \$500,000 – Indefinite, Wage Determination, Location Known	
266	A-76 Sealed Bid \$100,000 - \$500,000, Wage Determination, Location Unknown	
267	A-76 Sealed Bid \$500,000 – Indefinite, Wage Determination, Location Unknown	
270	NISH Contract	282
271	NISH Supplemental Agreement	222
276	A&E Negotiated Competitive \$100,000 – Indefinite	218
280	Misc. Supplemental Lease Agreement	91
999	Awards up to \$2,500 (Pilot)	5

\*Days

**Exhibit 3**  
**Acquisition Points of Contact**

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